

UNIT RECORD REPORT SUBMISSION 2008-2009 Update

IMPETUS FOR CHANGES

- Increasing legislative interest in:
 - Student borrowing
 - Need & unmet need
- Clarity on loans, tuition waivers, & institutional aid
- New financial aid programs

COLLABORATION WITH SFA WORKGROUP

Violet Boyer – ICW

Agnes Canedo – CWU

Janet Cantelon – SU

Clara Capron – WWU

Bruce Defrates – EWU

Karen Driscoll – Clark

Angela Headwall – Art Institute

Darlene Hendirckson – Gonzaga

Carla Idohl-Corwin- SPSCC

Kay Lewis – UW

Cindy Morana – COP

Terri Odell – ITT Seattle

Lorraine Odom – Highline

Julie Anderson – TESC

Suzanne Scheldt – NSCC

Rick Sinclair- Interface College

Karen Specht – Clover
Park

Ronelle Funk, SBCTC

COLLABORATION WITH URR SUBCOMMITTEE

Cree Bradford – UPS

Peggy Fitzwater – UW

Jean Meyer – WWU

Adrian Naranjo – CWU

Becky Phillips – CIS

Karen Specht – Clover Park

Jennifer Steffen – WSU

Carolyn Williams – Whitworth

- Met April – December 2008 to discuss technical implications & feasibility

STUDENTS TO INCLUDE

- All need-based aid recipients & all aid they received
- NEW: Non-need based loan recipients of Unsubsidized Stafford Loans, PLUS, & Grad PLUS loans

ICW member institutions will provide aggregate PLUS & Grad PLUS including total disbursed & total number of students via email

NEW FIELDS

NEW FINANCIAL AID PROGRAMS

- Federal TEACH Grant (Field 59)
- Passport to College Scholarship (Field 60)
- GET Ready for Math & Science (placeholder) (Field 61)
- College Bound Scholarship (placeholder) (Field 62)

NEW FIELDS (cont'd)

NEED RELATED FIELDS

- Number of Family in College (Field 63)
 - Only include parents if they were counted in determining amount of need (Field 24)
- Cost of Attendance (Field 64)
 - Student budget related to amount of need (Field 24)

NEW FIELDS (cont'd)

FLAGS INDICATING TYPE of AID RECIPIENT

- Need-Based Aid Recipient (Field 69)
 - Did the student receive any need-based aid?
- FAFSA on File (Field 70)
 - Does the student have a FAFSA on file?
 - Some SBCTC Opp Grant, Worker Retraining, & non-need based loan recipients may not

NEW FIELDS (cont'd)

TUITION WAIVERS / INSTITUTIONAL AID

- 3½ % Grants & Scholarships – Field 67 (NEW)
public institutions only
- Non-Need Based Waivers – Field 68 (NEW)

Report waivers based on a combination of merit & need
in Field 41 (Need-Based Tuition & Fee Waivers)

REDEFINED & DISAGGREGATED FIELDS

TUITION WAIVERS / INSTITUTIONAL AID

- Need-Based Tuition & Fee Waivers (Field 41) – previously publics 3% / 4% funds, now all institutions report need-based waivers here
- All Other State Funded Gift Assistance (Field 43) – took out public waivers previously reported here
- Institutional Scholarships & Grants (Field 45) – took out tuition waivers previously reported here
- Outside Scholarships (Field 47) – clarified to ensure institutional grants & scholarships are reported in Field 45

REDEFINED & DISAGGREGATED FIELDS (cont'd)

LOANS

- Federal PLUS & Unsubsidized Loans (Field 35) – now only report Unsubsidized Stafford Loans
- Report Parent PLUS Loans in Field 65 (NEW)
- Report Grad PLUS Loans in Field 66 (NEW)

REASSIGNED FIELDS

- Pay close attention to field numbers
- Removal of 3 fields beginning with Field 51 resulted in the reassignment of 8 fields

2008-09 REPORT SUBMISSION TIMELINE

Spring / Summer: Unit Record Training &
Data Entry Application Available

October 9, 2009: Finalized, complete,
edited data due

2008-09 TIMELINE (cont'd)

October & November 2009: HECB analysis

December 2009: Unit Record reports are prepared for policy makers

February 2010: Institutional profiles available to schools

FREQUENTLY ASKED QUESTIONS

- Race & Ethnicity
- Reporting SWS
- Need Associated Disbursements & Disbursement Associated Need

RACE & ETHNICITY

- Field 12: Hispanic Origin
"0" = No, "1" = Yes, "2" = Unknown
- Field 13: Race data available
"0" = No, "1" = Yes
- If Field 13 indicates "1" (yes), a value of "1" (yes) must also be selected in one of the race fields (fields 14-19)
 - field 14 (American Indian or Alaska Native)
 - field 15 (Asian)
 - field 16 (African American)
 - field 17 (Pacific Islander)
 - field 18 (White)
 - field 19 (other)

RACE & ETHNICITY (cont'd)

Hispanic Origin	Race Data Available	Race Data in Fields 14-19	Results:
Any Response	"1" = Yes	"1" = Yes	No Error
Any Response	"0" = No	"0" = No or Blank	No Error
"1" = Yes	"1" = Yes	"0" = No or Blank	Error
"1" = Yes	"0" = No	"1" = Yes	Error
Any Response	"1" = Yes	"0" = No or Blank	Error



REPORTING SWS

- Report students' total gross earnings, which includes employer match
- Remember to include summer employment
- Separate on-campus & off-campus employment
- SWS Total (Field 37) must equal the sum of on-campus (Field 38) & off-campus (Field 39)

NEED & DISBURSEMENT DATA

- Need Associated Disbursement (Field 52)
 - Do financial aid payments overlap 2 different academic years?
- Disbursement Associated Need (Field 53)
 - Were disbursements based on a FAFSA from the previous or the next academic year?

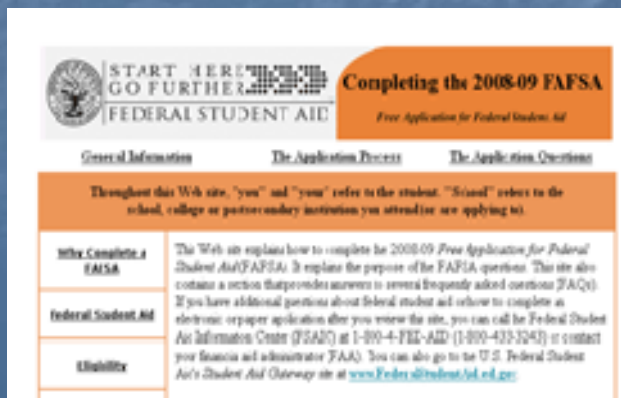
Need Associated Disbursement (Field 52)

- Student receives one federal loan
- Payments are disbursed over 2 different academic years
- Answer “0” – Not all disbursements are included in this Unit Record
- 1 Loan = 2008-2009 payment & another payment disbursed in a different academic year (could be 2009-2010 or 2007-2008)
- For more information see p. 20 of the manual

Disbursement Associated Need (Field 53)

- In 2008-2009, a student receives grants & scholarships based on the 08-09 FAFSA & a summer loan payment based on the 09-10 FAFSA
- Answer "0" - Disbursements are not based on a FAFSA from only 1 year
- For more information see p. 20 of the manual

Grants & Scholarships based
on 08-09 FAFSA



START HERE! GO FURTHER! FEDERAL STUDENT AID
Completing the 2008-09 FAFSA
Free Application for Federal Student Aid

General Information The Application Process The Application Questions

Throughout this Web site, "you" and "your" refer to the student. "School" refers to the school, college or postsecondary institution you attend (or are applying to).

Who Completes a FAFSA	The Web site explains how to complete the 2008-09 Free Application for Federal Student Aid (FAFSA). It explains the purpose of the FAFSA questions. This site also contains a section that provides answers to several frequently asked questions (FAQs). If you have additional questions about federal student aid before you complete an electronic or paper application after you review the site, you can call the Federal Student Aid Information Center (FSAIC) at 1-800-4-FED-AID (1-800-433-3243) or contact your financial aid administrator (FAA). You can also go to the U.S. Federal Student Aid's Student Aid Gateway site at www.FederalStudentAid.ed.gov .
Federal Student Aid	
Eligibility	



Summer loan disbursement
based on 09-10 FAFSA



START HERE! GO FURTHER! FEDERAL STUDENT AID
Completing the 2009 - 2010 FAFSA
FREE APPLICATION FOR FEDERAL STUDENT AID
July 1, 2009 - June 30, 2010

General Information The Application Process The Application Questions

Throughout this Web site, "you" and "your" refer to the student. "School" refers to the school, college or postsecondary institution you attend (or are applying to).

Who Completes a FAFSA	Tell your friends! The official FAFSA is at www.FAFSA.ed.gov - not at a "com site". We site. If you go to a "com site," you will probably be asked to pay to submit the FAFSA. Remember, the first Fin "FAFSA" stands for "free" - so use the official government site to submit your application.
Federal Student Aid	The Web site explains how to complete the 2009-10 Free Application for Federal Student Aid (FAFSA). It explains the purpose of the FAFSA questions. This site also contains a section that provides answers to several frequently asked questions (FAQs). If you have additional questions about federal student aid or how to complete an electronic
Eligibility	

NEW & REVISED EDITS

- Most relate to Need-Based Aid Recipient (Field 69) & FAFSA on File (Field 70)
 - Edits will be “softened” accordingly

NEW & REVISED EDITS (cont'd)

- Need-Based Aid Recipient Checks (Field 69)
 - For need-based aid recipients ("1")
 - At least one form of need-based aid must be reported
 - Amount of need (Field 24) must be greater than zero
 - Duration of need (Field 25) must be greater than zero
 - For non need-based aid recipients ("0")
 - No need-based aid should be reported
- See Appendix A for a list of need-based & non-need based financial aid

NEW & REVISED EDITS (cont'd)

- FAFSA on File (Field 70)
 - Should only be no ("0") for some SBCTC Opp Grant, Worker Retraining, or non-need based loans recipients
- Number in family in college (Field 63) can not exceed number in family (Field 22)
- Amount of need (Field 25) can not exceed cost of attendance (Field 64)

BEST PRACTICES

- Start early
- Use informational reports built into the application
- Check for consistency & validity
- Call if you are having problems or have questions

URR MAIN MENU

Data Entry
Add Record Level Data
Edit Record Level Data
Upload Data From a File
Edit Reports
Edit Report Listing by SSN
Edit Report Listing by Error Type
Edit Report Listing by Last Name
SNG Students Not Reported
Utilities
Erase All Institution Data

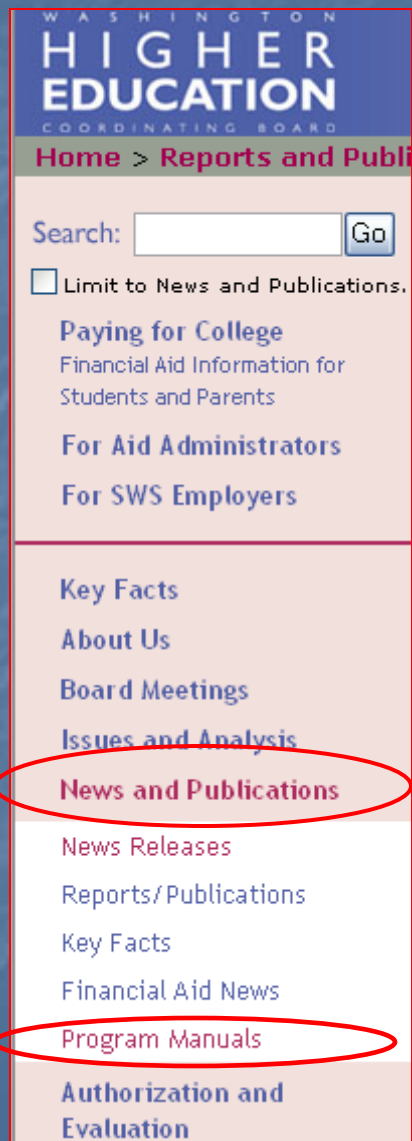
Informational Reports
Program Totals Report **
**Program Total Report takes a while to run, please be patient.
Residency Status Distribution
Gender Distribution
Dependency Status Distribution
Marital Status Distribution
Age Distribution
List of All Possible Edits

Finalize Your Report
Submit Your Unit Record to the HECB

INFORMATIONAL REPORTS

Institutional Totals								
Aid	UR01-02 Dollars	UR02-03 Dollars	UR03-04 Dollars	Change 02-03/03- 04	UR01-02 Recipients	UR02-03 Recipients	UR03- 04 Dollars	Change 02-03/03- 04
Federal Aid								
Federal Workstudy	\$442,176.00	\$409,592.00	\$409,592.00	0.00%	219	192	192	0.00%
Nurse Health Loans	\$0.00	\$0.00	\$0.00	0.00%	0	0	0	0.00%
Nurse Scholarship	\$0.00	\$0.00	\$0.00	0.00%	0	0	0	0.00%
Pell	\$3,729,595.00	\$4,161,695.00	\$4,161,695.00	0.00%	1447	1503	1503	0.00%
Perkins	\$643,966.00	\$704,624.00	\$704,624.00	0.00%	278	284	284	0.00%
PLUS	\$4,051,824.00	\$5,420,769.00	\$5,420,769.00	0.00%	1012	1143	1143	0.00%
SEOG	\$346,224.00	\$356,116.00	\$356,116.00	0.00%	428	292	292	0.00%
Stafford	\$6,771,167.00	\$7,497,739.00	\$7,497,739.00	0.00%	1771	1926	1926	0.00%
Subtotals:	\$15,984,952.00	\$18,550,535.00	\$18,550,535.00	0.00%	5155	5340	5340	0.00%
Institutional/Other Aid								
Institutional Grants, Etc.	\$777,599.00	\$859,859.00	\$859,859.00	0.00%	471	496	496	0.00%
Institutional Off Campus	\$100,000.00	\$100,000.00	\$100,000.00	0.00%	50	01	01	0.00%

URR ONLINE MANUAL



1) Home page:
www.hecb.wa.gov

2) News and Publications

3) Program Manuals

URR ONLINE MANUAL

WASHINGTON
**HIGHER
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COORDINATING BOARD

News and Publications

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Paying for College
Financial Aid Information for
Students and Parents

For Aid Administrators

For SWS Employers

Key Facts

About Us

Board Meetings

Issues and Analysis

News and Publications

News Releases

Reports/Publications

Key Facts

Financial Aid News

Washington Student Financial Assistance

**2008-09 Financial Aid Program Manuals
(for use by financial aid administrators)**

- [Educational Opportunity Grant Manual](#) (2008-09)
- [GEAR UP Scholarship Program Manual](#) (2008-09)
- [State Need Grant Program Manual](#) (2008-09)
- [State Work Study Program Manual](#) (2008-09)
- [Unit Record Manual, 2008-09 Academic Year](#) (April 2009)

2007-08 Manuals

[State Need Grant](#) (2007-08)

[State Work Study](#) (2007-08)

[Educational Opportunity Grant](#) (2007-08)

What's New

In the News

4/21/09
Stimulus cash to give scientific research at UW, elsewhere big shot in arm ♦

4/20/09
Finances weigh heavily on minds of prospective college students ♦

4/17/09
WSU applications may be closed, but you still have options ♦

4/14/09
UW to eliminate about 1,000 jobs by May 1 ♦

4/14/09
Locked-In Tuition Is a Win for Families but a Tough Sell for

CONTACT US FOR ASSISTANCE

It's easier to work with you before you submit your file than to find & correct errors afterward.

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Policy Roundable

- Revitalizing Financial Aid
 - Rebranding *Opportunity Pathway*
 - Financial aid awareness
 - NASFAA's NCI
- Transfer Oriented Programs
 - Could EOG enhance institutional efforts?
- Federal Changes
 - 2009-2010 FAFSA changes
 - FWS Stimulus